

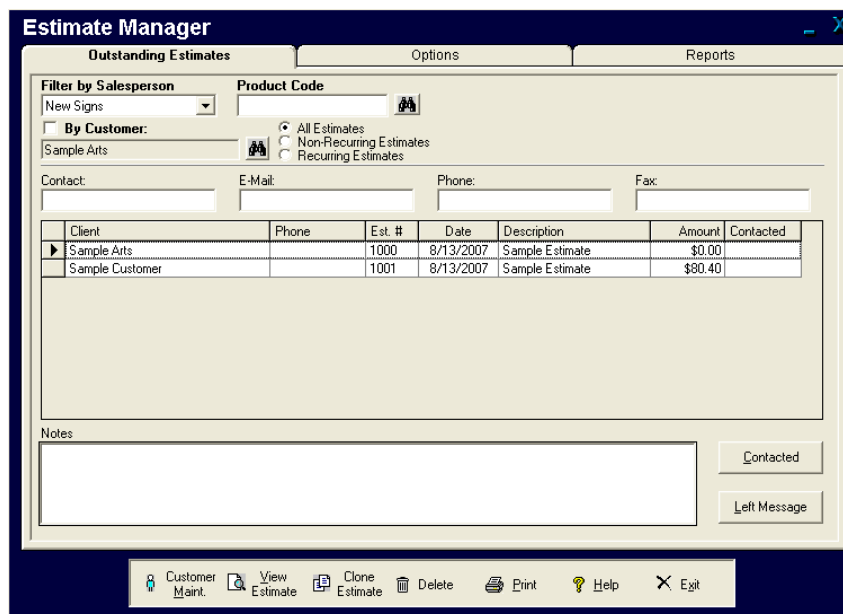
Estimate Manager

ADVANTAGE'S Estimate Manager feature lets you view, change, duplicate, or delete existing estimates.

- From the **ADVANTAGE** main menu, select **Order Processing** then **Estimate Manager**:



- ADVANTAGE** will display the **Estimate Manager**:

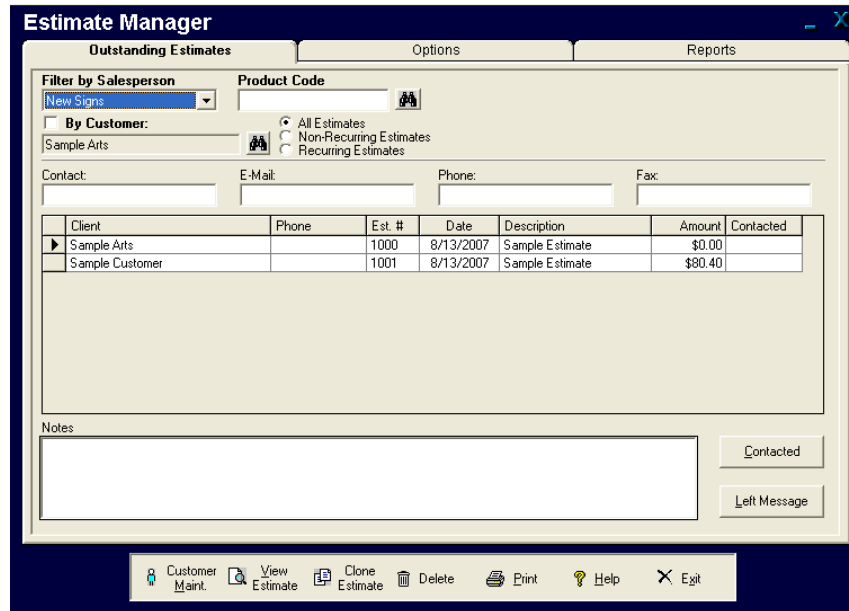


Outstanding Estimates

- Click on the **Outstanding Estimates** tab:

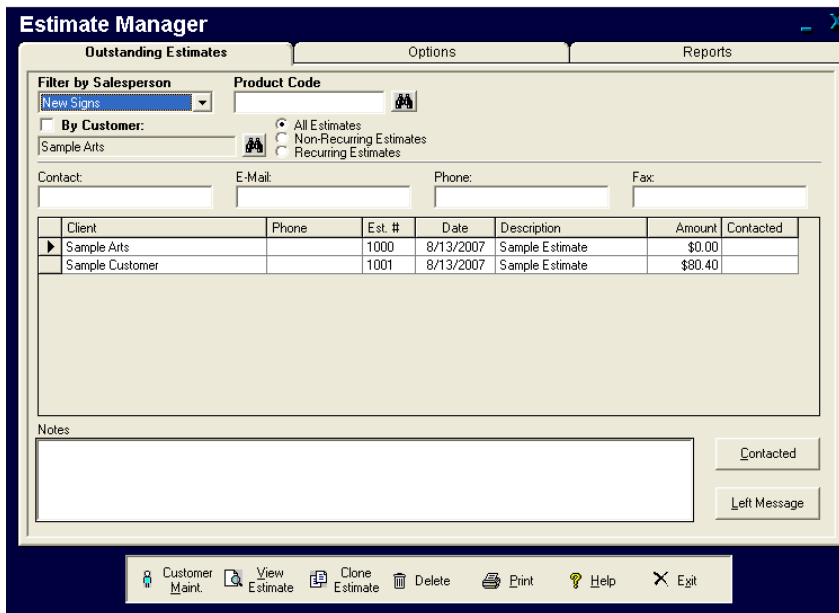


- You can locate the estimate that you are looking for using the filtering options:



- Filter by Salesperson** – look up outstanding estimates by salesperson. This is a good way to manage follow-up calls
- Product Code** – filter by product code. This is useful for prospecting.
- Click on the **Client** whose estimate you wish to look at. Clicking on it will highlight it.
- ADVANTAGE** will fill in the **Contact** information
- Notes** – use this for keeping a log of when you contacted the customer, what was said, when to follow-up, or anything else you consider important enough to keep a record of
- To insert a note with a time and date, click on **Contacted**.
- If you left a message, click on **Left Message** to enter a time and date-stamped note of your message

Contacted and **Left Message** aren't required. They are just there to enter often-used notes that are date & time stamped. You **can** add to or change them if you want to.



Client	Phone	Est. #	Date	Description	Amount	Contacted
▶ Sample Arts		1000	8/13/2007	Sample Estimate	\$0.00	
Sample Customer		1001	8/13/2007	Sample Estimate	\$80.40	

- ✚ Highlight a line and click **Customer Maint.** to open the **Customers and Prospects** screen (see *Customer Maintenance* document for more information)
- ✚ Click **View Estimate** to open the estimate in **Quick View** (see the *Quick View* document for more information)
- ✚ Click **Clone Estimate** to open a new estimate (with a new estimate number) as a copy of an existing estimate

Cloning creates the new estimate number, but you **can't make the changes here**. You have to open it in **Estimates /Invoices** to actually make the changes

Time Saving Idea - Some companies set up products as "templates." Then when they sell the same product again, they open the estimate template for that product, clone it and they don't have to enter all the information every time.

- ✚ Click **Delete** to delete an estimate. Doing so will require you to enter a reason for deleting the invoice to help prevent accidental removal of an estimate, or intentional removal (for the wrong reasons).
- ✚ Click **Print** to print, view, or email an estimate.

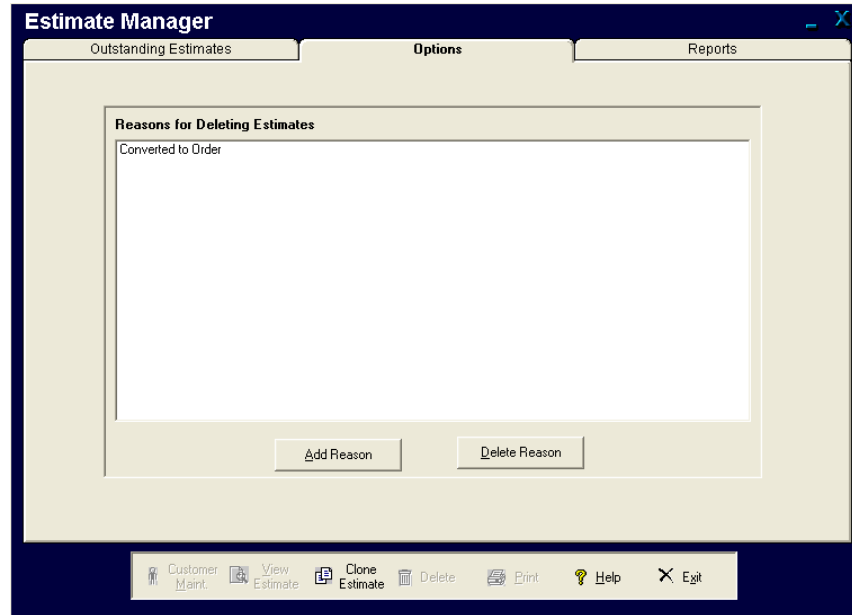
Why email estimates? If a customer or prospect tells you that an estimate has been lost or misplaced, you can quickly and easily send them a new copy, keeping the prospect alive.

Options

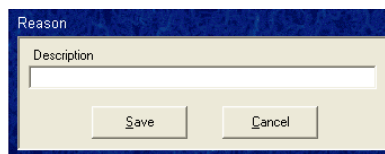
- Click on the **Options** tab:



- ADVANTAGE** will display the list of **Reasons for Deleting Estimates**:



- To add a new reason, click on **Add Reason**
- ADVANTAGE** will open the **Reason** box:



- Type in your new reason and click **Save**
- To delete a reason, click on **Delete Reason**

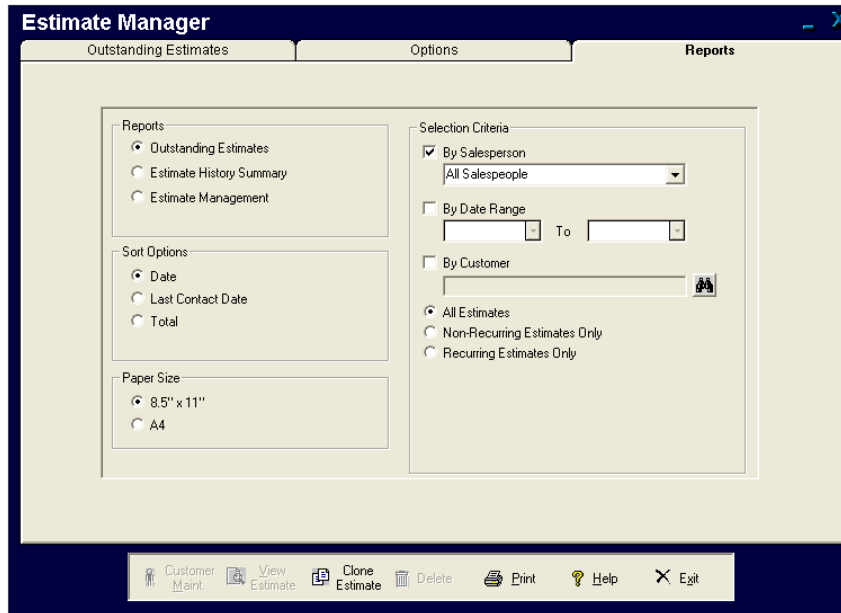
You cannot edit a reason. If you need to, you must delete it then create a new one.

Reports

- Click on the **Reports** tab:



- ADVANTAGE** will open the **Reports** screen:



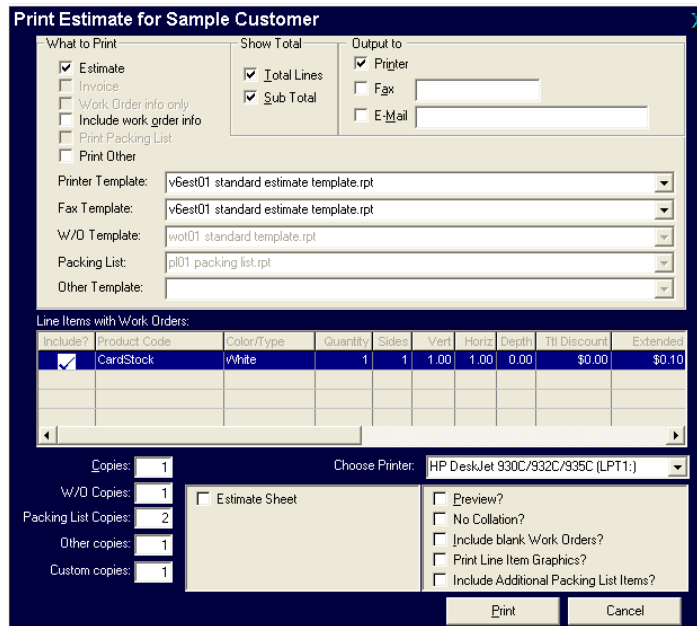
- Reports** – what to print. select Outstanding (open) Estimates, a summarized history of estimates, or an **Estimate Management** report
- Sort Options** – what order to print in
- Selection Criteria** – these are filters to use when printing your reports. You can select **By Salesperson**, **By Date Range**, **By Customer**, and/or **All Estimates**, **Non-Recurring Estimates**, and **Recurring Estimates** only.

By Salesperson is automatically checked and you cannot unselect it. **By Date Range** is optional. If you do not specify a date range, you will get all dates.

- Click **Print** to select your printer, view, and print the estimate

Printing the Estimate

- From the **Outstanding Estimates** tab, highlight the estimate that you wish to print, then click **Print**
- ADVANTAGE** will display the **Print Estimate** screen for the estimate that you selected:



Print Estimate for Sample Customer

What to Print

Estimate
 Invoice
 Work Order info only
 Include work order info
 Print Packing List
 Print Other

Show Total

Total Lines
 Sub Total

Output to

Printer
 Fax
 E-Mail

Printer Template: v6est01 standard estimate template.rpt
 Fax Template: v6est01 standard estimate template.rpt
 W/O Template: wot01 standard template.rpt
 Packing List: pl01 packing list.rpt
 Other Template:

Line Items with Work Orders:

include?	Product Code	Color/type	Quantity	Sides	Vert	Horiz	Depth	Ttl Discount	Extended
<input checked="" type="checkbox"/>	CardStock	vWhite	1	1	1.00	1.00	0.00	\$0.00	\$0.10

Copies: 1
 W/O Copies: 1
 Packing List Copies: 2
 Other copies: 1

Choose Printer: HP DeskJet 930C/932C/935C (LPT1:)

Estimate Sheet
 Preview?
 No Collation?
 Include blank Work Orders?
 Print Line Item Graphics?
 Include Additional Packing List Items?

Print Cancel

- What to Print** check off the selections that you would like to print. **Print Other** is for non-standard templates. If you check **Include work order info**, **ADVANTAGE** makes the **Line Items with Work Orders** section available. Items that have work orders associated with them are checked (will be printed). Simply click the check mark to turn it off if you don't want that work order printed.
- Show Total** – check the boxes to print the total and/or the subtotal
- Output to** – you can print and email

If you use the **ADVANTAGE Web Order** feature and enter and E-Mail address, **ADVANTAGE** sends the customer a *link* that let's the customer view the **estimate** online.

If you don't use the **ADVANTAGE Web Order** feature, the **estimate** is sent as an *attachment* to the email.

- Templates** – you can use the default printing templates or use the dropdown menu to choose different ones.

Print Estimate for Sample Customer

What to Print: Estimate, Invoice, Work Order info only, Include work order info, Print Packing List, Print Other

Show Total: Total Lines, Sub Total

Output to: Printer, Fax, E-Mail

Printer Template: v6est01 standard estimate template.rpt
 Fax Template: v6est01 standard estimate template.rpt
 W/O Template: wot01 standard template.rpt
 Packing List: pl01 packing list.rpt
 Other Template:

Includes?	Product Code	Color/Type	Quantity	Sides	Yield	Hours	Depth	10 Discount	Extended
<input checked="" type="checkbox"/>	CardStock	White	1	1	1.00	1.00	0.00	\$0.00	\$0.10

Copies: 1, W/O Copies: 1, Packing List Copies: 2, Other copies: 1, Custom copies: 1

Choose Printer: HP DeskJet 930C/932C/935C (LPT1:)

Estimate Sheet, Preview?, No Collation?, Include blank Work Orders?, Print Line Item Graphics?, Include Additional Packing List Items?

Print Cancel

- ✚ **Choose Printer** – you can use the dropdown menu to select a different printer if the default isn't the one you want to use.
- ✚ Enter the number of **Copies** of each you want printed.
- ✚ You can choose which options including **Preview**, **Collation**, and others.
- ✚ **Estimate Sheet** – if you check this box, the report will show your profit margin. This will not be emailed.

It might be a good idea to print the **Estimate Sheet** before you send the estimate to the customer. That way, you can be sure you'll actually make a profit on the job.

- ✚ Once you have all of your options set, you can click **Print** to print your estimate.